

**SALES MANAGEMENT SYSTEM AND METHOD THEREOF**  
**BACKGROUND OF THE INVENTION**

**Field of the Invention**

The present invention relates to a sales management system and  
5 method for managing sales activities.

**Description of the Related Art**

The performance (result) of sales activities for achieving a  
business deal has greatly been depended upon the individual sales  
skills of or human relations established by the sales staff of an  
10 organization (company, corporation, enterprise, etc.). The effects of  
the sales activities, progress or progress status of a target business  
transaction have been subjectively evaluated, based on the  
experiences of the individual sales staffs.

Conventionally, it is very difficult to find out any necessary  
15 factor(s) for enhancing the success percentage of the business  
activities (visiting customers, explaining about target products, and  
such) just by oneself. At the same time, it is very difficult to  
acquire the sales skills just by oneself as well. To improve business  
performance, a large number of sales persons handle a number of  
20 business activities to improve their business results. That is, the  
sales persons try to improve their business performance using an  
inefficient technique.

Further, there are no guidelines, based on which the manager of  
the sales section at the organization objectively evaluates the contents  
25 of activities done by the sales person, the progress or progress status

of a target business transaction to be dealt. Hence, it is very difficult for the manager to understand the progress or progress status of the business transaction within a short time and to appropriately instruct the sales person in charge of the transaction to have better  
5 business performance.

### SUMMARY OF THE INVENTION

The present invention has been made in consideration of the above. It is accordingly an object of the present invention to provide a sales management system and its method, for enabling to  
10 perform sales activities with high efficiency, without depending on the personal skills of sales persons.

Another object thereof is to provide a sales management system and its method, for enabling a manager of a sales section to objectively evaluate the contents of activities done by sales persons  
15 of the sales section and the progress or progress status of a target business transaction to be dealt, and enabling the manager to appropriately instruct the sales persons to perform better business performance.

In order to attain the above objects, according to the first aspect  
20 of the present invention, there is provided a method for managing sales activities, the method comprising the steps of:

storing, in a database, a plurality of activity item information sets respectively representing each of a plurality of sales activity items included in sales activities for achieving a business transaction,  
25 in association with each of a plurality of stages according to which

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the plurality of sales activity items are classified based on progress of the business transaction;

retrieving one or more activity item information sets stored in the database, in response to an instruction from an operator of a  
5 terminal; and

controlling a display device of the terminal to display both of the one or more retrieved activity information sets and information representing one of the plurality of stages which corresponds to the one or more activity information sets.

10 According to the above method, the progress status of the sales activities can be managed by stage. Therefore, the sales activities can be done with high efficiency, without depending on the personal skills of the business performance.

The method may further include the step of storing, in the  
15 database, activity item evaluation information representing whether each of the plurality of activity items has been attained, in association with each of the plurality of activity item information sets.

According to the above method, the progress status of the sales activities can objectively be examined with ease.

20 The method may further include the step of controlling the display device of the terminal to display the one or more activity item information sets in association with the activity item evaluation information, by stage.

The method may further include the step of  
25 storing, in the database, in a case where the activity item

evaluation information represents that each of the activity items each associated with one of the plurality of stages has been attained, stage completion information representing that the one of the plurality of stages has been completed.

- 5       The method may further include the step of  
           storing, in the database, information representing a completion  
           scheduled date of each of the plurality of stages.

- The method may further include the step of  
           storing, in the database, in a case where the activity item  
 10      evaluation information represents that one of the activity items each  
           corresponding to one of the stages has not yet been attained even  
           after the completion scheduled date has passed, information  
           representing that the business transaction is delayed at one of the  
           plurality of stages.

- 15       The method may further include the step of  
           displaying information representing the completion scheduled  
           date of each of the stages and information representing an attainment  
           status of each of the stages, in association with each of the stages,  
           and

- 20       wherein the information representing the attainment status  
           represents  
           in a case where at least one activity item information set  
           represents that one of the activity items each corresponding to one of  
           the stages has not yet been attained, that the business transaction is  
 25      being delayed at one of the plurality of stages, and

5       The method may further comprise the step of  
controlling the display device of the terminal to display a  
message for suggesting the operator to change an action of the  
activity item evaluation information representing that one of the  
activity items has not yet been attained, when changing the activity  
10 item evaluation information corresponding to one of the activity  
items in association with a first stage of the plurality of stages so as  
to represent that the one of the activity items has been attained, in a  
case where the activity item evaluation information represents that  
one of the activity items corresponding to a second stage of the  
15 plurality of stages where the business transaction has been progressed  
to a level lower than a level of progression at the first stage has not  
yet been attained.

The method may further include the step of  
25 storing, in the database, a scenario of the sales activities toward

a customer of each target business transaction, in association with information representing the customer.

In order to achieve the above objects, according to the second aspect of the present invention, there is provided a sales-activity

5 management system comprising:

a processor which executes a process for managing sales activities;

a storage section which stores information necessary for executing the process; and

10 a timer which supplies the processor with time information, and wherein the processor

stores, in a database, a plurality of activity item information sets respectively representing a plurality of activity items included in the sales activities performed for achieving a business transaction, in  
15 association with each of a plurality of stages according to which the plurality of sales activities are classified based on progress of the business transaction,

retrieving one or more activity item information sets of the plurality of activity item information sets stored in the database, in  
20 response to an instruction from an operator of a terminal, and

controlling a display device of the terminal to display both of the one or more retrieved activity information sets and information representing one of the plurality of stages which corresponds to the one or more activity information sets.

25 The database may be included in the memory unit, or may be

prepared separately from the memory unit.

According to the above system, the progress status of the sales activities can be managed by stage. Therefore, the sales activities can be performed with high efficiency, without depending on the  
5 personal skills for business performance of sales persons.

The processor may further store, in the database, activity item evaluation information representing whether each of the plurality of activity items has been attained, in association with each of the activity item information sets.

10 The processor may control the display device of the terminal to display the one or more activity item information sets in association with the activity item evaluation information, by stage.

The processor may store, in the database, in a case where the activity item evaluation information represents that each of the  
15 activity items each associated with one of the plurality of stages has been attained, stage completion information representing that the one of the plurality of stages has been completed.

The processor may store, in the database, information representing a completion scheduled date of each of the plurality of  
20 stages.

In order to achieve the above objects, according to the third aspect of the present invention, there is provided a sales-activity management system comprising:

sales-activity-information storage means for storing, in a  
25 database, sales activity information regarding sales activities

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performed for achieving a business transaction;

sales-activity-information retrieval means for retrieving the sales activity information stored in the database; and

sales-activity-information display means for displaying the  
5 retrieved sales activity information on a display device, and

wherein the sales-activity-information storage means stores, in the database, activity item information representing the sales activities, in association with a plurality of stages according to which the sales activities are classified based on progress of the business  
10 transaction,

the sales-activity-information retrieval means retrieves the activity item information stored in the database, in response to an instruction of an operator of a terminal, and

the sales-activity-information display means sets the display  
15 device of the terminal to display the activity item information retrieved by the sales-activity-information retrieval means, in association with information representing each of the stages corresponding to the activity item information.

According to the above system, the progress status of the  
20 business activities can be managed by stage. Therefore, the business activities can be accomplished with high efficiency, without depending on the personal skills of sales persons.

In order to achieve the above objects, according to the fourth aspect of the present invention, there is provided a computer readable  
25 recording medium storing a program for controlling a computer to



execute the steps of:

storing, in a database, a plurality of activity item information sets respectively representing each of a plurality of sales activity items included in sales activities for achieving a business transaction, in association with each of a plurality of stages according to which the plurality of sales activity items are classified based on progress of the business transaction;

retrieving one or more activity item information sets stored in the database, in response to an instruction from an operator of a terminal; and

controlling a display device of the terminal to display both of the one or more retrieved activity information sets and information representing one of the plurality of stages which corresponds to the one or more activity information sets.

According to the computer executing the above program, the progress status of the sales activities can be managed by stage. Thus, the sales activities can be done with high efficiency, without depending on the personal skills of sales persons.

The program may further control a computer to execute the step of

storing activity item evaluation information representing whether each of the plurality of activity items has been attained, in association with each of the activity item information sets.

#### BRIEF DESCRIPTION OF THE DRAWINGS

These objects and other objects and advantages of the present

invention will become more apparent upon reading of the following detailed description and the accompanying drawings in which:

FIG. 1 is a diagram showing the structure of an SFA (Sales Force Automation) system according to an embodiment of this invention;

FIG. 2 is a diagram schematically showing the structure of data and programs stored in a storage section of an SFA server included in the SFA system of FIG. 1;

FIG. 3 is a diagram showing the logical data structure of information stored in a customer database shown in FIG. 2;

FIG. 4 is a diagram showing a selection page to be displayed on a sales-staff terminal included in the SFA system of FIG. 1;

FIG. 5 is a diagram showing a customer-list page to be displayed on the sales-staff terminal;

FIG. 6 is a diagram showing a transaction list page (by customer) to be displayed on the sales-staff terminal;

FIG. 7 is a diagram showing a customer-information registration page to be displayed on the sales-staff terminal;

FIG. 8 is a diagram showing a transaction list page to be displayed on the sales-staff terminal;

FIG. 9 is a diagram showing a maturity plan/history page to be displayed on the sales-staff terminal;

FIG. 10 is a diagram showing a maturity item page to be displayed on the sales-staff terminal;

FIG. 11 is a diagram showing an activity-list page to be

displayed on the sales-staff terminal;

FIG. 12 is a diagram showing a new-activity registration page to be displayed on the sales-staff terminal;

FIG. 13 is a diagram showing a transaction registration page to  
5 be displayed on the sales-staff terminal; and

FIG. 14 is a diagram showing a calendar page to be displayed on the sales-staff terminal.

### DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENT

10 A sales management method and sales management system according to an embodiment of this invention will now be explained. In this embodiment, explanations will now be made to an SFA (sales Force Automation) system for managing sales activities and  
manufacture processes for vending and manufacturing products by  
15 way of example.

FIG. 1 is a diagram showing the structure of the SFA system according to an embodiment of the present invention. As shown in FIG. 1, the SFA system comprises an SFA server 1, a plurality of sales-staff terminals 2-1 to 2-n ("n" represents the total number of the  
20 sales-staff terminals), a manager terminal 3, and an SCM (Supply Chain Management) server 4.

The sales-staff terminals 2-1 to 2-n and the manager terminal 3 are connected to the SFA server 1 through an external network (e.g. the Internet, etc.). The SCM server 4 is connected to the SFA server  
25 1 directly or through the external network.

The SFA server 1 comprises a processor 1A, a storage section 1B, and a timer 1C including a crystal oscillator and the like. The storage section 1B and the timer 1C are connected to the processor 1A. The processor 1A includes a CPU (Central Processing Unit) and the like, and carries out processes, as will be explained later. The timer 1C sequentially generates date/time information representing the present date and time.

The storage section 1B includes a hard disk device or a RAM (Random Access Memory), etc. The storage section 1B stores, as illustrated in FIG. 2, a customer database 10, a WWW (World Wide Web) server program 11, a CGI (Common Gateway Interface) for SFA tool 12, and an SFA tool program 13.

The customer database 10 stores information regarding target customers of sales activities managed by this SFA system and information regarding the sales activities for the target activities. Such information are stored in advance in the storage section 1B, and updated in accordance with operations as will be explained later.

FIG. 3 is a diagram showing the logical data structure of the information stored in the customer database 10. Specifically, as shown in FIG. 3, stored in the customer database 10 are customer information 31 regarding customers, transaction information 32 representing transactions to be proceeded with corresponding customers, and activity information 33 representing activities for each transaction, in association with each other.

In the case where a customer represents a section of an

organization (an enterprise, corporation, company, etc.), the customer database 10 stores the following data items of: (A) this customer (organization) name; (B) a corresponding section name; (C) a name of a sales staff in charge of a corresponding business transaction in the section; (D) a phone number, facsimile number, or e-mail address of this staff; and (E) the post of this staff, in association with each other.

The customer database 10 stores information representing a transaction proceeded with this customer, in a manner corresponding to the customer information. Specifically, in association with the information of the above data items of (A), (B), and (C), the customer database 10 stores information (F) (a transaction title showing the scenario information of a corresponding transaction, a product code attached to a target product to be sold to this customer, a group of product codes to one of which the target product belongs) for identifying the contents of the corresponding transaction to be dealt with the customer. Note that information for specifically explaining the details of the corresponding transaction to be dealt with the customer may be added in a text format to the above information for identifying the details of the corresponding transaction.

Further, the customer database 10 stores information representing plans and results of the business activities for the transaction concerned, in a manner corresponding to the above customer information and transaction information. Specifically, in

association with the above information (F), the customer information  
 10 stores information (G) representing plans and results (maturity  
 plan) of the business activities performed for the transaction  
 concerned. The maturity plan shown in the information (G) is  
 5 classified into the following nine stages (1) to (9), in accordance with  
 an intermediate goal (hereinafter referred to as "maturity") which  
 should be accomplished to achieve the deal.

(1) Stage for Making Connection (actions for getting in contact  
 with new customers, including a visit to the new customers);

10 (2) Stage for Making Relation (actions for keeping in touch with  
 customers, in order to know the important customers);

(3) Stage for Examining Considerable Matters (actions for  
 researching any matters which may have some influence on a  
 contract to be made with the customer, such as an action for  
 15 researching about a completing company(ies) or equipment  
 currently-possessed by the customer);

(4) Stage for Providing Something to Attract Customer (actions  
 for providing something to meet the desire of the customer);

(5) Stage for Understanding Needs of Customer (actions for  
 20 researching contents of product demanded by the customer);

(6) Stage for Picking Up Matters to be Solved (actions for  
 picking up matters to be solved in order to successfully provide the  
 product demanded by the customer);

(7) Stage for Formal Proposal (actions for proposing contract for  
 25 supplying product demanded by the customer);

(8) Stage for Clearing Factors Which May Obstruct Customer to Make Contract (actions for cleaning up any factors which may obstruct the customer to make a contract); and

(9) Stage for Entering into Contract.

- 5        Each maturity plan is classified into any one of the above nine stages. The more the stage increases, i.e. from (1) to (9), the more the level of maturity increases as well (i.e. reaching to the success in the deal (transaction)).

- The information (G) representing the maturity plan
- 10    corresponding one of the nine stages of maturity includes activity list information, maturity form information, maturity item information, and check flag information. The activity list information (a list of activities) represents specific contents of activities for accomplishing the level of maturity and a planned date for the activities. The
- 15    maturity form information (maturity form) represents a scheduled date for accomplishing the level of maturity. The maturity item information describes a maturity item which represents an aspect from which it is determined whether the level of maturity is accomplished. The check flag information represents whether the
- 20    aspect represented in the maturity item of the corresponding transaction is fulfilled. However, each transaction may have a kind of the maturity without any maturity plan.

- The customer database 10 stores information (H) representing the credibility of customers, in association with the customers lacking
- 25    in credibility as judged by the sales staff. The information (H)

includes information, representing whether a deal can be made with a corresponding customer and information, suggesting not to have a deal with the corresponding customer even if it is possible.

The customer database 10 stores, in association with each  
 5 transaction, information (I) representing a person or group competing with the manager of this SFA system in a deal.

The customer database 10 stores information (J) representing a corresponding staff, contents of a plan, and results of activities for the plan without association with any particular customers. The  
 10 customer database 10 stores, in association with the information (A) of a corresponding customer, information (K) representing a plan and results of activities without association with any particular transactions and done for a particular customer and information (L) representing a scheduled date for completing a scenario describing  
 15 ideas for enhancing the level of maturity in association with a deal to be made with the particular customer. Further, the customer database 10 stores, in association with the information (L) and the information (A), information (M) representing a combination of the scenario and the scheduled date on which the scenario should be  
 20 completed.

The customer database 10 stores a "non-scenario" flag, an "scenario-reviewed" flag, a "delay scenario" flag, a "non-maturity plan" flag, a "non-reviewed maturity plan" flag, a "maturity completion" flag, and a "maturity delay" flag, as will be explained  
 25 later. The customer database 10 updates a status of each of the flags,



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[illegible]

program 13, and provides the converted data thereto. The CGI 12 receives the result of the processing done in accordance with the data, from the SFA tool program 13, converts data of the processing result into a Web page description format, such as HTML (Hypertext Markup Language), and provides the WWW server program 11 with the converted data.

The SFA tool program 13 is a program serving as the SFA system to be provided to any one of the sales-staff terminals 2-1 to 2-n or manager terminal 3. If the SFA tool program 13 is called from the CGI 12 and receives the data representing the operational contents of the accessing terminal, it executes various processes including the operations of the customer database 10 based on the received data so as to serve as an SFA tool, and sends results of the various processes to the CGI 12.

The above-described operations of the SFA server 1 are common operations of the SFA server 1. Hence, if not necessary in particular, operations of the WWW server program 11, CGI 12 and SFA tool program 13 will not separately be described. Instead, such operations will be described as the operations of the SFA server 1 as a whole.

Each of the sales-staff terminals 2-1 to 2-n is a terminal which is operated mostly by the sales staff to perform the business activities. Each of the sales-staff terminals 2-1 to 2-n includes a personal computer, etc. serving as a client device. The sales-staff terminals 2-1 to 2-n and manager terminal 3 respectively include display

devices 2A-1 to 2A-n and 3A each having a liquid crystal display etc.  
 and input devices 2B-1 to 2B-n and 3A each having a keyboard or  
 mouse, etc. The sales staff registers, in the customer database 10,  
 information representing target customers and business transactions  
 5 and/or information representing plans and results (maturity plan) of  
 the business activities regarding each corresponding business  
 transaction, in accordance with their business activities. Also, the  
 sales staff refers to the registered information, and makes plans for  
 business activities to be processed.

10 A WWW browser runs on each of the sales-staff terminals 2-1 to  
 2-n. The operator of each of the sales-staff terminals 2-1 to 2-n  
 operates the WWW browser, and accesses the SFA server 1 so as to  
 operate the above-described customer database 10.

If the operator of a particular sales-staff terminal specifies a  
 15 URL of the SFA server 1, the WWW browser of the sales-staff  
 terminal accesses the SFA server 1. In the accessed SFA server 1,  
 the WWW server program 11 sends data representing a  
 predetermined Web page to the corresponding sales-staff terminal,  
 for displaying the Web page on the terminal. Further, the operator  
 20 of the accessing terminal specifies a URL of the CGI by inputting the  
 URL of the CGI 12 or clicking on a certain point of the Web page  
 which is linked to the CGI 12. Upon this, the WWW server  
 program 11 activates the CGI 12. When the SFA server 1 is  
 accessed upon specification of the URL of the SFA server 1 by the  
 25 sales-staff terminal, the WWW server program 11 may automatically

activate the CGI 12.

Operations of the SFA server 1 and sales-staff terminal 2-k will now specifically be explained with reference to FIGS. 4 to 14, in the case where the sales staff operates the sales staff terminal 2-k and  
 5 where the CGI 12 is activated upon operation of the sales staff terminal 2-k.

FIG. 4 is a diagram showing a schematic image of a selection page. The SFA server 1 sets the sales-staff terminal 2-k to display the selection page for specifying a target item to be operated. That  
 10 is, in the SFA server 1, the activated CGI 12 provides the WWW server program 11 with data representing a Web page of the selection page. The WWW server program 11 provides the sales-staff terminal 2-k with the received data. The WWW browser of the sales-staff terminal 2-k displays the selection page represented by the  
 15 data supplied from the SFA server 1, on the display of the display device 2A-k included in the sales-staff terminal 2-k.

On various pages shown in the drawings for illustrating the embodiment of the present invention, those sections (parts) which are not directly related to the descriptive part of the present invention  
 20 will not or just briefly be explained in this specification. Of course, each of those pages has a GUI (Graphical User Interface) included in a PC which is generally employed in the sales-staff terminals and/or manager terminal.

As illustrated in FIG. 4, the selection page includes six tabs 41 to  
 25 46 which are set in one-to-one correspondence to items of

5 password. The box 47 for inputting the user name is in a pull-down menu form. If the operator clicks on an arrow on the right part of the box 47, the registered user name is displayed in a pull-down list form.

10 corresponding name from the pull-down list displayed in the box 47  
and inputs a password in the box 48, the operator may click on one of  
the six tabs 41 to 46. Upon this, the WWW browser of the sales-  
staff terminal 2-k sends information representing the specified user  
name and password and the clicked tab to the SFA server 1. After  
15 the SFA server 1 verifies that the received user name and password  
are proper information, it sends data representing a display page  
corresponding to the tab shown in the received information to the  
sales-staff terminal 2-k. The WWW browser of the sales-staff  
terminal 2-k receives the sent data, and displays the display page  
20 represented by the received data on the display screen of its display  
device 2A-k.

25 corresponds to the tab shown in the received information. Then, the

SFA server 1 sends Web page data representing the set display page in an HTML form to the sales-staff terminal 2-k.

In the case where the clicked tab corresponds to either one of the items of "Customer", "Section", or "Staff to Contact With", the display page to be displayed on the sales-staff terminal 2-k under the control of the SFA server 1 includes a list of target "Customer", "Section", or "Staff". FIG. 5 is a diagram showing an example of a customer list page which is shown in the case where the tab corresponding to the item of "Section" is clicked on. As shown in FIG. 5, the customer list page includes a customer list 51. The customer list may be created in such a manner that the SFA server 1 searches the customer database 10 for the information of (A), (B), or (C), and creates HTML form data representing a display page showing customer name(s), section name(s) or staff name(s) shown in the searched information. As shown in FIG. 5, the customer list page includes, on its left side, five views 54 to 58 of "Customer", "Section", "Transaction", "Activity(ies)", and "Scenario".

In FIG. 5, if the name of each item of "Customer", "Section", or "Staff to contact with" is underlined, the name is set in the form of a hyperlink. Through this hyperlink, the information representing the customer name, section name, or staff name is connected to a list of transactions in association with each other. Hence, if the operator of the sales-staff terminal 2-k clicks on a customer (organization) name, section name, or staff name included in their corresponding list displayed on the display page, the SFA server 1 displays a display

5 clicked name included in the information (F). Then the SFA server  
1 creates HTML data representing a display page including the  
business transactions shown in the read information.

10 case where the operator of the sales-staff terminal 2-k clicks on an  
item name "AA branch" of the customer (company "B") listed in the  
second line of the customer list page shown in FIG. 5. As  
illustrated in FIG. 6, displayed on the transaction list page (by  
customer) are information 61 regarding the customer and section  
15 together with a transaction list 62 of the section.

20 If the operator clicks on the "new registration" button on the transaction list page, the SFA server 1 sets the sales-staff terminal 2-k to display a later-described transaction registration page.

25 With", the operator may specify the line of the customer in the

customer list, and click on the view 56 of "Transaction" on the left hand side of the page, thereby succeeding in shifting to the transaction list page shown in FIG. 6.

FIG. 7 is a diagram showing the customer-information registration page. As illustrated in FIG. 7, the customer-information registration page includes four text boxes 71 to 74 for inputting respectively "Customer" representing a name of a customer to newly be registered, "Section", "Staff to Contact With", and "Scheduled Date" for creating a strategic scenario for a target customer. The customer-information registration page includes also a "Completion" button 75 for indicating that the inputting is completed.

After the operator inputs required information in each of the text boxes 71 to 74 and clicks on the "Completion" button 75, the sales-staff terminal 2-k sends the input information, i.e. the information representing the customer name, section name, staff name, and scheduled date, to the SFA server 1. Upon this, the SFA server 1 receives the information from the sales-staff terminal 2-k, and registers the information representing the customer name, as the information (A), in the customer database 10. Further, the SFA



server 1 registers the information representing the section name, staff name, and scheduled date, as the information (B), (C), and (D) in association with the information (A), in the customer database 10.

In the case where the customer name or scheduled date input in the respective text boxes 71 and 74 have already been registered in the customer database 10, the received information representing the section name and staff name are registered in the customer database 10, as the information (B) and (B).

The customer information (e.g. job information the corresponding customer, address and phone number of the customer, etc.) other than the information (A), (B) and (C), can be retrieved from a generally-prepared company database other than the customer database 10. When displaying the customer information on the transaction list page shown in FIG. 6, the SFA server 1 may simply retrieve necessary information from the company database using a search key, such as the customer name, etc. When registering a new customer, the SFA server 1 may search the company database for some necessary information, and register the searched information in the customer database. Further, the SFA server 1 may imports information, which can not easily be retrieved from the company database, from the customer-information registration page or from any other page, so as to input the transported information.

If the SFA server 1 newly registers the information (A) and information (L) in the customer database 10, it sets a "non-scenario" flag indicating that there is no information (M) (scenario)

corresponding to the information (A), in the customer information registered in the customer database 10.

Attached to each of the customer names included in the list of customers is a scenario button 53 for registering the strategic scenario.

- 5 If the operator of the sales-staff terminal 2-k clicks on the scenario button 53, the SFA server 1 sets the sales-staff terminal 2-k to display a page for registering the strategic scenario.

- The page (not illustrated) for newly registering the strategic scenario includes: two text boxes for inputting a pathname (e.g. directly name, file name, and the like) of the scenario to be newly registered the scheduled date on which the scenario should be completed; and a "Completion" button for indicating that the inputting is completed.
- 10

- The strategic scenario is created using, for example, a general spread sheet program. The operator of the sales-staff terminal 2-k executes a program for creating the scenario, inputs the strategic scenario, and creates a file describing the strategic scenario.
- 15

- Subsequently, the operator inputs the pathname and scheduled date of the created file in a corresponding text box of the above-described page for registering the scenario, and clicks on the "Completion" button. Then, the sales-staff terminal 2-k sends a file of the input pathname and the input scheduled date, to the SFA server 1. Upon reception of the sent file, the SFA server 1 adds the file and scheduled date in the customer database 10, as the information (M).
- 20

- 25 At this time, the information (M) is stored in the customer database

10, in association with the information (A) representing the customer name having a "new registration" button attached thereto.

If the SFA server 1 newly adds the information (M) in the customer database 10 in association with the information (A) (customer name), it resets a "non-scenario" flag representing that there is no strategic scenario corresponding to the information (A).

The SFA server 1 specifies any customer(s) for whom the strategic scenario has not been created even after the scheduled date specified in the information (L), of the entire customers registered in the customer database 10, based on the present date and time specified in the date/time information sent by the timer 1C. The SFA server 1 sets a "delay-scenario" flag representing that the strategic scenarios respectively for the specified customers are delayed being created.

In the case where the operator clicks on a tab corresponding to the item of "Transaction" in the selection page of FIG. 4, the page which the SFA server 1 sets the sales-staff terminal 2-k to display includes a list of entire business transactions. FIG. 8 is a diagram showing a transaction-list page having this list of entire business transactions. As illustrated in FIG. 8, the transaction-list page includes a transaction list 81, for example. The transaction list can be created in such a way that the server SFA 1 retrieves the information (A), (B), (C), and (F) from the customer database 10 and creates an HTML data representing a page showing several transactions represented in the retrieved information.

Further, as shown in FIG. 8, the transaction-list page includes a "New Registration" button 82 for newly registering a business transaction. If the operator clicks on the "New Registration" button on the transaction-list page, the SFA server 1 sets the sales-staff terminal 2-k to display a later-described transaction registration page.

The transaction list displayed on the transaction-list page of FIG. 8 includes a "Competitor" button 83 for newly registering information representing a competitor of each business transaction. If the operator of the sales-staff terminal 2-k clicks on this "Competitor" button 83, the SFA server 1 sets the sales-staff terminal 2-k to display a page for inputting the information representing a competitor of each business transaction.

A page (not illustrate) for inputting the information representing the competitor includes a text box for inputting a competitor name and a "Completion" button for indicating that the inputting of information is completed.

The operator of the sales-staff terminal 2-k inputs the competitor name in the text box, and clicks on the "Completion" box. Then, the sales-staff terminal 2-k sends the input competitor name to the SFA server 1. Upon reception of the sent competitor name, the SFA server 1 adds the competitor name in the customer database 10, as the information (I). Note that the information (I) is stored in the customer database 10, in association with the information (F) representing the business transaction corresponding to the clicked competitor button attached thereto.

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maturity stage from the customer database 10, and sets the sales-staff terminal 2-k to display a maturity item page for displaying the retrieved information.

FIG. 10 is a diagram showing the maturity item page. As shown in FIG. 10, the maturity item page includes information 101 regarding a target business transaction and information 102 regarding a maturity item corresponding to the clicked maturity stage. The information 102 includes a maturity item representing some aspects based on which it is determined whether a corresponding maturity stage is accomplished. Further, the maturity item page includes some check boxes 103 showing whether each corresponding maturity stage is accomplished.

If the operator of the sales-staff terminal 2-k selects on an arbitrary check box, the sales-staff terminal 2-k sends information representing that the corresponding check box has been marked. Upon reception of the information representing that the corresponding check box has been marked, the SFA server 1 stores the completion date and received information in the customer database 10. When displaying the maturity item page on the sales-staff terminal 2-k, the SFA server 1 sets the sales-staff terminal 2-k to show a check mark in the check box of the maturity item corresponding to the information, representing that the aspects of the maturity item are accomplished and stored in the customer database 10.

Based on the present date and time shown in the date/time

information generated by the timer 1C, the SFA server 1 examines the accomplishment level of each maturity stage for all the transactions stored in the customer database 10, and stores an examination result in the customer database 10. That is, the SFA

5 server 1 specifies whether there is a maturity stage corresponding to an unchecked check box even the scheduled date has passed. After this, the SFA server 1 sets a "maturity delay" flag representing that the specified maturity stage is delayed being accomplished. If there is no maturity stage corresponding to an unchecked check box, i.e. if

10 all check boxes are marked, the SFA server 1 sets a "maturity completion" flag. When displaying the maturity plan/history page shown in FIG. 9 on the sales-staff terminal 2-k, the SFA server 1 sets information representing that the maturity stage is delayed being accomplished, in the column of the completion date, if the "maturity

15 delay" flag is set. In addition, the SFA server 1 sets the last date of the completion dates respectively corresponding to the maturity stages, if the "maturity completion" flag is set.

When displaying the maturity item page on the sales-staff terminal 2-k, the SFA server 1 displays also a message for suggesting

20 to check a check box.

In the state where there is a check box which has not yet been checked, of check boxes of a predetermined maturity stage to be displayed, the operator may click on a maturity stage at a higher level than the level of the maturity stage of the unchecked check box. In

25 this case, the SFA server 1 sets the sales-staff terminal 2-k to display

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FIG. 9, the SFA server 1 may display an incorporated page of FIG. 10 in combination with the page of FIG. 9 on the sales-staff terminal 2-k. The incorporated page includes the information 102 showing the maturity item specified by the operator, in addition to the

5 information 91 and maturity plan/history 92.

On the selection page of FIG. 4, in the case where the tab selected by the operator of the sales-staff terminal 2-k corresponds to "Activity", the page which the sales-staff terminal 2-k displays is to show a list of information regarding all activities included in the

10 maturity plans of the entire business transactions. A transaction title, a customer name, and a section name are affixed to the activity information, in association with each item of the activity information included in the list.

FIG. 11 is a diagram showing an activity-list page. As shown

15 in FIG. 11, the activity-list page shows a list of activity information sets included in the maturity plans of the entire business transactions, according to scheduled dates of the activities.

Activity information 111 shown on the activity-list page includes: details of each activity, the maturity of the activity,

20 scheduled date and time of the activity, customer name, section name of customer's organization, and transaction title, in association with each other. Further, a text box for inputting the date on which the activity shown in the activity list was actually held is affixed to each activity information set shown in the list.

25 In the case where a predetermined activity is held not for a

The SFA server 1 searches the customer database 10 for the above-described information (A) and (B) and the activity information included in the information (G), so as to acquire the activity information to be shown on the activity-list page. After this, the SFA server 1 specifies how the searched activity information is classified according to the maturity. The SFA server 1 creates HTML data representing a page having the searched activity information, transaction title, customer name, section name, maturity, and text box. In addition, the SFA server 1 sends the created data to the sales-staff terminal 2-k to display the data thereon.

If a customer name and a section name included in the information regarding each activity and shown on the activity-list page are underlined and shown on the activity-list page, the information representing the names are set in the form of a hyperlink for displaying only the activity information regarding its corresponding customer(s) or section. If the operator of the sales-staff terminal 2-k clicks on an arbitrary one of the customer name and section name, the SFA server 1 sets the sales-staff terminal 2-k to display the activity-list page, showing the activity information including the information (G) in relation to the clicked customer name or section name.

25 If a transaction title included in the information regarding each

activity shown on the activity-list page is underlined, the information representing the transaction title is set in the form of a hyperlink for displaying the maturity plan/history page in relation to the transaction title on the sales-staff terminal 2-k. If the operator of the sales-staff

5 terminal clicks on an arbitrary transaction title, the SFA server 1 searches the customer database for the information (maturity plan) (G) corresponding to the clicked transaction title. Subsequently, the SFA server 1 displays the maturity plan/history page corresponding to the transaction on the sales-staff terminal 2-k.

10 In the case where the information (maturity plan) (G) in relation to the clicked transaction title is not stored in the customer database 10, the SFA server 1 sets the sales-staff terminal 2-k to display a page for registering the maturity plan of the transaction. The page for inputting the maturity plan includes a plurality of text boxes for  
15 inputting the activity information, scheduled completion date, and maturity item, according to maturity. The page includes also a “Completion” button for indicating that the inputting is completed.

If the operator of the sales-staff terminal 2-k inputs the activity information of each maturity, the scheduled completion date, and the  
20 maturity item, and clicks on the “Completion” button, the sales-staff terminal 2-k sends all of the input data to the SFA server 1. Upon reception of the activity information, scheduled completion date, and maturity item, the SFA server 1 stores the received information in the customer database 10, as the information (G). Note that the SFA  
25 server 1 stores the information (G) in association with the

information, regarding the business transaction corresponding to the transaction title clicked on the activity-list page, and included in the information (F) stored in the customer database 10.

Further, after the SFA server 1 stores the information (G) in association with the information (F) in the customer database 10, it resets a “non-maturity plan” flag indicating that the information (G) corresponding to the information (F) does not exist. The SFA server 1 resets also a “non-reviewed maturity plan” flag indicating that the information (G) has not yet been reviewed (examined) by the manager.

The activity-list page includes a “New Activity Registration” button 112 for newly registering a planned activity to be taken place or an already-held activity. If the operator of the sales-staff terminal 2-k clicks on the “New Activity Registration” button 112, the SFA server 1 sets the sales-staff terminal 2-k to display a page for inputting a list of new activities in relation to a particular business transaction.

FIG. 12 is a diagram showing a “New Activity Registration” page. As illustrated in FIG. 12, the “New Activity Registration” page includes three pull-down menu boxes 121, 122 and 123, two text boxes 124 and 125, another pull-down menu box 126, and a “Completion” button. The boxes 121, 122 and 123 are prepared for respectively specifying a customer name of a corresponding activity shown in newly registered activity information, a corresponding section at his/her organization, and a business transaction of the

specified customer name. The two text boxes 124 and 125 are prepared for respectively specifying details of the corresponding activity and a scheduled date of the activity. The box 126 is prepared for inputting the maturity of the activity. The

5 "Completion" button is prepared for indicating that the inputting is completed.

If the operator of the sales-staff terminal 2-k clicks on an arrow on the right hand side of the box 121, a list of customers registered in the customer database 10 appears. Then, the operator selects a corresponding customer name. Similarly, the operator clicks on an arrow of each of the boxes 122 and 123, so as to specify the corresponding section name and transaction title. Further, the operator inputs the details of the activity and the schedule date respectively in the text boxes 124 and 125. Upon clicking on the arrow of the box 126, a list of maturity stages appears. Then, the operator selects a corresponding maturity stage, and clicks on the "Completion" button 127. Upon clicking on the "Completion" button, the sales-staff terminal 2-k sends the specified customer name, section name, transaction title, details of the activity, scheduled date, and maturity stage, to the SFA server 1. Upon reception of the information from the sales-staff terminal 2-k, the SFA server 1 registers the activity information including the details of the activity and the scheduled date, in association with the specified customer name, section name, transaction title, and maturity stage, in the customer database 10.

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On the "New Registration Activity" page shown in FIG. 12, the list of customers, which is displayed if the operator of the sales-staff terminal 2-k clicks on the arrow of the box 121, includes an item of "Not For Particular Customer". If the operator specifies this item,

5 the SFA server 1 registers the input activity information in the customer database 10, as information representing an activity for not for particular customers. Similarly, in the case where the operator specifies an item of "Not for Particular Section" and/or "Not for Particular Transaction" included in the lists of the boxes 122 and 123,

10 the SFA server 1 registers the input activity information in the customer database 10, as the activity information not for particular section or activity information not for particular transaction.

In addition to the above, to register the activity information not for particular customer, section, or transaction, a "New Activity

15 Registration" button for registering such activity information may be set on the activity-list page shown in FIG. 11, separately from the "New Activity Registration" button for registering the information regarding the normal activity for a particular customer or particular transaction.

20 In this case, the activity-list page shown in FIG. 11 includes a "New Activity Registration" button for newly registering an activity not for a particular transaction, together with the "New Activity Registration" information button for registering the information registering the normal activity for a particular customer or particular

25 transaction. If the operator of the sales-staff terminal 2-k clicks on

the latter "New Activity Registration" button, the SFA server 1 sets the sales-staff terminal 2-k to display a page for inputting new activity information not for particular customer.

The page for inputting the new activity information not for particular transaction includes two text boxes and a "Completion" box. The two text boxes are for respectively for inputting the detail information of the activity and the scheduled date of the activity. The page also includes a "Completion" button for indicating that the inputting is completed.

10 If the operator of the sales-staff terminal 2-k inputs the detail information of the activity and the scheduled date of the activity and clicks on the "Completion" button, the sales-staff terminal 2-k sends the input information to the SFA server 1. Upon reception of the information from the sales-staff terminal 2-k, the SFA server 1  
15 registers the received activity information in the customer database 10.

The activity-list page shown in FIG. 11 further includes a "New Transaction Registration" button 113 for newly registering a transaction. If the  
20 operator of the sales-staff terminal 2-k clicks on this button 113, the SFA server 1 sets the sales-staff terminal 2-k to display a transaction-registration page.

FIG. 13 is a diagram showing the transaction-registration page. As shown in FIG. 13, the transaction-registration page includes  
25 information 131, transaction information 134 to be registered and a

“Completion” button 138. The information 131 represents a customer of a transaction to be registered. The “Completion” button 138 is to indicate that the inputting is completed. The customer information 131 is to specify a customer of the transaction  
5 to be registered.

In the case where the operator clicks on the button 63 on the transaction list page (by customer) of FIG. 6, the SFA server 1 sets the sales-staff terminal 2-k to display a corresponding and a section name at the corresponding customer’s organization (company, etc.)  
10 respectively in the boxes 132 and 133. This is because the transaction list page (by customer) is to show a list page regarding a specified customer.

In the case where the operator clicks on the button 82 on the transaction list page shown in FIG. 8 or where the operator clicks on  
15 the button 113 on the activity list page shown in FIG. 11, the SFA server 1 sets the sales-staff terminal 2-k to display the customer names or section names registered in the customer database 10 in the box 132 or 133, in the form of a pull-down list. The operator of the sales-staff terminal 2-k pulls down the box 132 or 133 to specify a  
20 customer name or section name in relation to a target business transaction to be registered.

Further, the operator inputs information representing a transaction title, sales-staff name and details of the transaction, in relation to the transaction to be registered respectively in the boxes  
25 135, 136 and 137, and he/she clicks on the “Completion” button 138.



Upon this, the sales-staff terminal 2-k sends the specified or input information representing the customer name, section name, transaction title, sales-staff name, and details of the transaction, to the SFA server 1. Upon reception of the information sent from the sales-staff terminal 1, the SFA server 1 checks that the received customer name and section name are registered in the customer database 10, and registers the received information representing the transaction title, sales-staff name and details of the corresponding transaction in the customer database 10, in association with the received customer name and section name. At this time, the SFA server 1 sets a "non-maturity plan" flag indicating that there is no information of the maturity plan corresponding to the registered transaction information.

In the case where the operator of the sales-staff terminal 2-k specifies that there is no need to create the maturity plan, the sales-staff terminal 2-k provides the SFA server 1 with "non-planned-transaction information" indicating that the operator has thus specified, together with the transaction information regarding the input transaction title. When registering thus provided transaction information together with the non-planned-transaction information in the customer database 10, the SFA server 1 sets a "non planned" flag indicating that the maturity plan information corresponding to the registered transaction information is not necessary.

On the selection page shown in FIG. 4, in the case where the tab clicked by the operator of the sales-staff terminal 2-k corresponds to

the item of "Calendar", the SFA server 1 sets the sales-staff terminal 2-k to display a page. This page shows, in the form of a calendar, information regarding activities included in the maturity plans of the entire transactions that the operator of the sales-staff terminal 2-k, i.e. the corresponding sales staff, is in charge of. This calendar may be a daily calendar, weekly calendar or monthly calendar.

FIG. 14 is a diagram showing a monthly calendar page. As shown in FIG. 14, various activity information sets in the calendar are underlined. This means that the information sets are in a hyperlink form so as to be linked to detail information regarding the activities. If the operator of the sales-staff terminal 2-k clicks on an arbitrary one of the activity information sets, the SFA server 1 sets the sales-staff terminal 2-k to display the detail information of a corresponding activity. A box 141 included in the calendar is prepared for specifying a sales staff name, and shows registered sales staff names in the form of a pull-down list. Usually, an operator of the sales-staff terminal 2-k is permitted to specify only the sales staff name that has been input on the selection page shown in FIG. 4. If the operator pulls down the box 141 and specifies a staff name other than the input name, the sales-staff terminal 2-k sends the specified name to the SFA server 1. However, the SFA server 1 ignores the specified name, and continues to display the same calendar page on the sales-staff terminal 2-k.

On the monthly calendar page shown in FIG. 14, if the operator of the sales-staff terminal 2-k clicks on a view of "Activity" 142 on

the left hand side of the page, the SFA server 1 sets the sales-staff terminal 2-k to display activity information of a corresponding month, in the form of the activity-list page shown in FIG. 11.

The manager terminal 3 is operated by the manager of the sales section, for managing the activities of the sales staff. For example, the manager terminal 3 may be a personal computer, etc. having substantially the same structure as that of the sales-staff terminals 2-1 to 2-n.

The manager terminal 3 carries out substantially the same operations as those of the sales-staff terminals 2-1 to 2-n, by activating the WWW browser installed therein. However, the manager terminal 3 does not have a function for inputting the above-described information (A) to (M), and refers to the information registered in the customer database 10. Hence, it is sufficient that the manager terminal 3 displays a Web page in the HTML format which is sent from the SFA server 1, so that the operator of the sales-staff terminal 2-k checks the information contents displayed thereon and inputs information representing that the operator has checked the information.

If the operator of the manager terminal 3, i.e. the sales manager, etc., operates the terminal 3, the manager terminal 3 and the SFA server 1 operates in the manner described below, in accordance with the operations of the operator.

The operator of the manager terminal 3 is the sales manager who should usually be a boss of the sales staff. The sales manager

5 accesses the SFA server 1. Then, the SFA server 1 sets the manager terminal 3 to display the selection page shown in FIG. 4 thereon.

terminal 3 to display the monthly calendar page shown in FIG. 14 or a daily or weekly calendar page. The SFA server 1 selects either one of a daily calendar, weekly calendar or monthly calendar, based on pre-set information or previous selection. If the sales manager specifies a target sales person to be checked, from the pull-down list shown in the box 141 of the calendar page, the manager terminal 3 sends the specified person's name to the SFA server 1. Upon reception of the information representing the specified sales person's name from the manager terminal 3, the SFA server 1 retrieves activity information of the sales person from the customer database 10, and controls the manager terminal 3 to display the retrieved activity information. The sales manager can refer to the activity information of an arbitrary sales person.

25 information, the SFA server 1 displays the detail information of the

specified activity information on the manager terminal 3. If the sales manager clicks on the view of "Activity" on the calendar page, the SFA server 1 controls the manager terminal 3 to display a list of activities done by the specified sales person in the form of the activity list page shown in FIG. 11. The activity information is displayed in the form of a daily calendar, a weekly calendar or a monthly calendar, in accordance with the calendar page.

The sales manager may click on a particular transaction title of the corresponding activity information on the displayed page, to check the activities done or to be done by the sales staff in relation to a concerned transaction included in the activity information displayed on the activity list page. Upon this, the manager terminal 3 sends the clicked transaction title to the SFA server 1, and the SFA server 1 sets the manager terminal 3 to display a maturity plan/history page of the corresponding transaction. The sales manager check the work context of the corresponding transaction on the maturity plan/history page displayed on the manager terminal 3, and clicks on a target maturity name of a maturity so that the sales manager can check the maturity level thereof according to each maturity. Then, the SFA server 1 having received information representing the clicked maturity name from the manager terminal displays a maturity item page of the specified maturity, on the manager terminal 3.

The sales manager checks the attainment level of the maturity item by maturity and the progress of the entire business transactions, based on the information contents displayed on the maturity

plan/history page and maturity item page, thereafter inputting information representing that the review of the corresponding maturity plan has been completed. Then, the manager terminal 3 sends the review-completion information to the SFA server 1.

- 5 Upon reception of the review completion information, the SFA server 1 resets a corresponding "non-reviewed maturity plan" flag in the customer database 10, so as to indicate that the information (G) representing the shown maturity plan has been reviewed.

- If the sales manager clicks on the view "Scenario" 58 in the state  
10 where the customer information is selected on the customer list page shown in FIG. 5, the SFA server 1 controls the manager terminal 3 to display information (representing a path name of a file described in a strategic scenario and the date the scenario is created) regarding the strategic scenario for the corresponding customer. If the sales  
15 manager completely reviewed the strategic scenario inputs information representing about the completion of the scenario, the manager terminal 3 sends information representing that the strategic scenario has completely reviewed to the SFA server 1. Upon reception of this information from the manager terminal 1, the SFA  
20 server 1 sets an "scenario reviewed" flag in the customer database 10, so as to indicate that the sales manager has completed reviewing the information (M).

- In the case where the SFA server 1 sets the manager terminal 3 to display a list of customers, a check box is attached to each of the  
25 customer names included in the list. This check box is to show

whether a “non-maturity plan” flag is set in association with a corresponding customer. If the sales manager clicks on the check box indicating that the “non-maturity plan” flag is set, the manager terminal 3 sends information, to the SFA server 1, representing that it is necessary to make a maturity plan for the customer corresponding to the marked check box. Upon reception of the information from the manager terminal 3, the SFA server 1 resets the “non-maturity plan” flag for the customer(s) corresponding to the marked check box.

10 The SCM server 4 comprises a processor 4A and a storage section 4B. The processor 4A includes a CPU, etc., and carries out later-described processes. The storage section 4B is connected to the processor 4A, and includes a hard disk device or a RAM, etc.

The SCM server 4 estimates the demand for each kind of products to be manufactured, and outputs an estimated result in response to external accessing (an external response). The SCM server 4 determines a number of each kind of products to be ordered, based on the estimated result of the demand and the amount of stock (or estimated amount of stock) of each kind of products. Then, the  
15 SCM server 4 outputs an estimated number of products to be ordered, in response to external accessing.

Specifically, the SCM server 4 estimates the demand for a kind of products, based on a status of a check flag included in the information (maturity plan) (G) registered in the customer database  
25 10 which the SFA server 1 stores.

In more particular, the processor 4A of the SCM server 4 accesses at predetermined intervals the customer database 10 stored in the storage section 1B included in the SFA server. Every time the processor 4A accesses the customer database 10, it obtains  
 5 numbers of business transactions registered in the customer database, in groups of transactions each group of which corresponds to the same product code (or product group code) of target products to be sold and each group of which is at the same maturity level attained so far.

- 10 The processor 4A calculates a reduction rate of the numbers of business transactions at the same maturity level attained so far, according to each group of transactions corresponding to the same product code (or product group code) of target products to be sold, based on a result of calculations successively done for two times.
- 15 The processor 4A obtains a value derived by substituting the calculated reduction rate for a predetermined function, thereby determining the demand of products by each group of products having the same product code.

The structure of the SFA system is not limited to the above.

- 20 For example, the same server computer may have the functions of the SFA server 1 and SCM server 4. The sales-staff terminal 2-k may have the function of the manager terminal 3. Further, the SFA server or SCM server 4 may act as the sales-staff terminal 2-k or manager terminal 3.

- 25 When obtaining the numbers of business transactions, the SCM



5 corresponding to products of the same product code. At the same time, the SCM server 4 obtains the number of transactions at the so-far attained maturity stage for "Formal Proposal" by business transaction corresponding to products of the same product code.

15        The embodiment of the present invention has been explained above. The sales management system according to this invention can be realized using a general computer system without a dedicated system therefor.

For example, a program for executing the operations of the  
20 above SFA server 1, sales-staff terminals 2-1 to 2-n, manager  
terminal 3 and SCM server may be stored on a medium (a CD-ROM,  
a magnetic tape, etc.). The program is installed in a plurality of  
computers each including a DSU or terminal adapter and being  
connected with each other through a network, thereby realizing the  
25 SFA system that carries out the above-described processes.

Additionally, a program for executing operations of the SFA server 1, sales-staff terminals 2-1 to 2-n, manager terminal 3 and SCM server 4 may be recorded on a medium. The program may be installed in a stand-alone computer, thereby realizing the SFA system  
5 that carries out the above-described processes.

For example, the program may be posted on a BBS (Bulletin Board System) on a communications circuit and transmitted through the circuit. A carrier wave(s) may be modulated using a data signal representing the program, and a resultant modulated wave may be  
10 transmitted to an apparatus. Then, this apparatus may restore the program by demodulating the received wave.

This apparatus activates the program, and executes any other application programs, so as to carry out the above processes, under the control of the OS (Operating System).

15 In the case where a part of the processes is done by the OS, or where the OS may be a part of the elemental components of the present invention, a program excluding that part may be stored on a recording medium. In such a case as well, according to this invention, a program for executing each of the functions of steps  
20 executed by the computer is stored on the recording medium.

The customer database 10 is installed separately from the SFA server 1, and the SFA server may access the customer database 10 through a network. For example, the software of the SFA server 1 is provided by an ASP (an Application Service Provider, etc.), and  
25 the customer database 10 may be installed in a computer system of a

Further, instead of managing the plans and schedules of the sales activities in association with the nine stages of the maturity levels, the SFA server 1 may manage the plans and schedules in association with the number of stages in a manner corresponding to the field contents activities to be managed. When building the sales management system of the present invention, the number of maturity stages and contents of each maturity stage may be defined in the SFA server 1.

15 The above-described embodiment is intended to illustrate the present invention, not to limit the scope of the present invention. The scope of the present invention is shown by the attached claims rather than the embodiment. Various modifications made within the meaning of an equivalent of the claims of the invention and within the claims  
20 are to be regarded to be in the scope of the present invention.

This application is based on Japanese Patent Application No. 2000-299945 filed on September 29, 2000, and including specification, claims, drawings and summary. The disclosure of the above Japanese Patent Application is incorporated herein by  
25 reference in its entirety.